

POSITION DESCRIPTION

DOA-15302 (C07/2015)
PREVIOUSLY OSER-DMRS-10
State of Wisconsin
Department of Administration/Division of Personnel Management

Rvsd 4/4/18

1. Position No. 310704		2. Cert / Reclass Request No. 18-7774 Effective:	3. Agency No. 566
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue Division of Technology Services Customer Service Bureau Data Capture Section Scanning Unit 2135 Rimrock Road Madison, WI 53714		
6. CLASSIFICATION TITLE OF POSITION Revenue Tax Assistant-Objective			
7. CLASS TITLE OPTION (to be filled out by Human Resources Office)	8. NAME AND CLASS OF FORMER INCUMBENT Annette Johnson, Revenue Tax Assistant-Objective		
9. AGENCY WORKING TITLE OF POSITION	10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES Diane Hill, Revenue Tax Assistant-Objective		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Mike Sutter Management Information Chief	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		
13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes [] No [X] IF YES, COMPLETE AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM			

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

SEE ATTACHED

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION

- a. The supervision, direction, and review given to the work of this position is [] close [] limited [X] general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.

Signature of first-line supervisor _____ Date _____

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee _____ Date _____

18. Signature of Human Resources Manager _____ Date _____

POSITION SUMMARY (Line 14)

Scan documents from a wide variety of sources such as individual income tax documents, business tax forms, and other miscellaneous documents utilizing assigned equipment and software, including Intelligent Forms Processing (IFP) and Kofax. Perform equipment maintenance and data validation as assigned. Identify scanning problems and suggest improvements.

This position requires the ability to lift 25 pounds or less of paper work with or without an accommodation. Must perform miscellaneous duties using standard processes, as assigned by the Supervisor.

This position works under the general supervision of the Data Capture Section Chief.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 85% A. Performance of Scanning, Rescanning, Data Verification and Capture of Data.
 - A1. Scan and/or rescan tax forms utilizing IFP or Kofax.
 - A2. Select appropriate Form Type, Form Year and Class Type for scanning documents.
 - A3. Prepare, sort and assemble documents for scanning.
 - A4. Perform remittance additions and log appropriately following scanning of records.
 - A5. Screen for missing information on documents when doing rescans.
 - A6. Take appropriate action when information is missing or coding problems arise.
 - A7. Use project reference material provided.
 - A8. Perform Original Entry (OE) when a scanned form does not image properly.
 - A9. Perform Original Entry Acceleration (OEA) activity as directed.
- 10% B. Performance of Other Duties required for the Efficient Functioning of the Unit.
 - B1. Assist in training staff in the proper use of the hardware and software used, proper procedures used in the scan, rescan and verification for all tax types used.
 - B2. Perform miscellaneous duties as assigned to assure the smooth operation of the unit.
 - B3. Perform daily cleaning and maintenance duties on equipment.
 - B4. Route documents according to established procedures.
 - B5. Determine the proper form type, tax type and liability codes when scanning documents.
 - B6. Utilize Microsoft Office Programs (e.g. Word, Outlook and/or Excel) as needed for job duties.
- 5% C. Other Work Activities as Assigned by the Supervisor.
 - C1. Dispose of extracted forms, returns and correspondence as required through confidential waste.
 - C2. Accept work activities in other units or sections due to varying workloads and perform these activities in accordance with standards established by the Supervisor of the assigned unit.
 - C3. Complete special assignments as requested by lead worker or Section Chief of the Data Capture Section.

KNOWLEDGES, SKILLS AND ABILITIES

1. Knowledge of Scan and Rescan hardware and software systems
2. Ability to prepare, sort and assemble documents for scanning.
3. Knowledge of Data Capture/Data Entry hardware and software system.
4. Knowledge of the flow of documents through the Processing Bureau.
5. Knowledge of the order and function of scanning and data capture processing steps.
6. Knowledge of timeliness standards and the effect of customer deadlines on workflow.
7. Knowledge of the general operation of the Intelligent Forms Proprocessing (IFP), and Kofax software program used in the Scanning, Rescanning, Data Verification, Original Entry and Original Entry processes.
8. Knowledge of procedures and the use of standardized abbreviations used in Data Verification.
9. Knowledge of the various tax documents processed by data capture.
10. Knowledge of training techniques and evaluations.
11. Knowledge of deadlines associated with the tax forms processed in a timely manner within the Unit.
12. Knowledge of end user needs and expectations.
13. Knowledge of Department of Revenue document retention and release standards.
14. Ability to utilize Microsoft Office Programs (Word, Outlook and/or Excel).
15. Skill in keeping detailed recording of scanned work (e.g. document type, totals of check amounts scanned, etc.)
16. Ability to screen for missing information in scanned document.

Special Requirement: Must have the ability to lift a box of paper weighing 25 pounds or less with or without an accommodation is required.